



INDIA MEDIA LANDSCAPE

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Country Overview

THE WORLD'S SECOND MOST-POPULOUS NATION AFTER CHINA

Overview of India



CAPITAL
New Delhi

REGION
Asia

GDP PER CAPITA, PPP
\$6,997

GDP
\$2.87 trillion

POPULATION
1,366,417,754

AREA
3,287,263 SQ.KM

The world's largest democracy, India is a federal republic with 29 relatively autonomous states and seven union territories.

Although agriculture employs the most workers, services are the major source of economic growth.

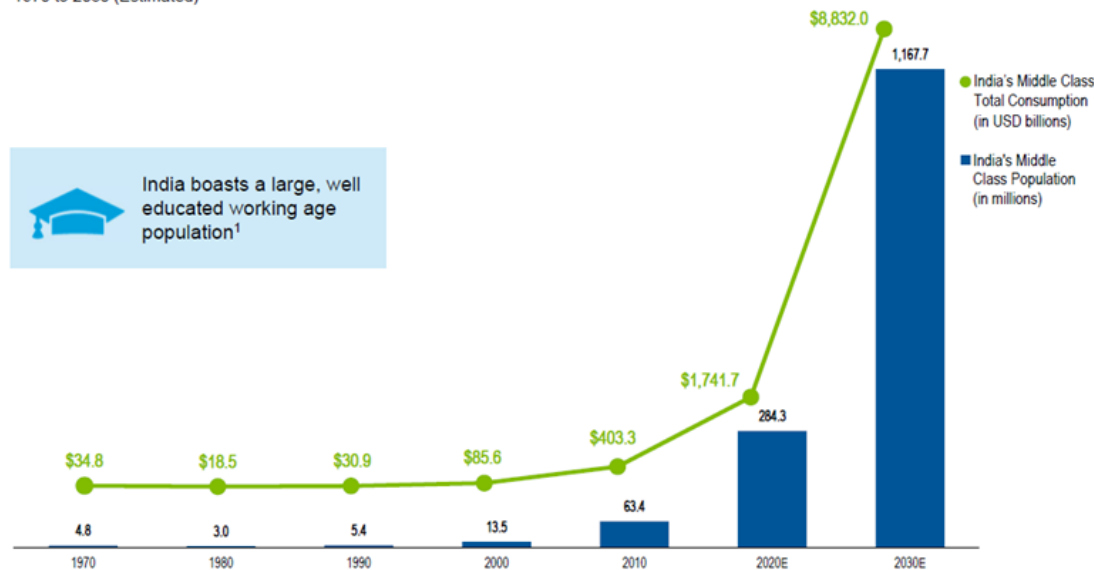
English is the most important language for national, political and commercial communication, but Hindi is the most widely spoken.

Country Overview

GROWING MIDDLE CLASS SET TO MAKE IT THE 3RD LARGEST CONSUMER MARKET BY 2030

India's Future Growth Expected to Be Fueled by a Massive Middle Class Population

Projected Middle Class Population and Consumption
1970 to 2030 (Estimated)



1. The working age population is defined as those aged 15–64.

Sources: Brookings Institution: Development, Aid, and Governance Indicators (DAGI), FactSet and Ministry of Statistics & Programme Implementation–India, March 2015. See www.franklintempletondatasources.com for additional data provider information.

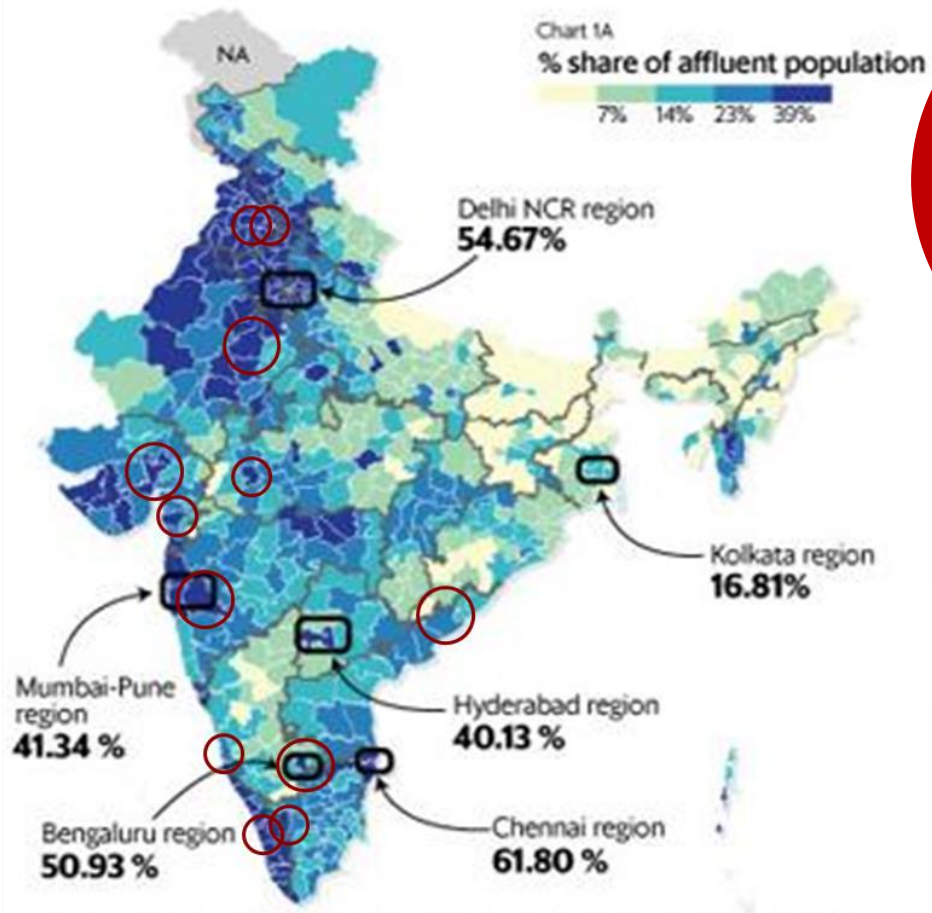
With an annual GDP growth rate of 7.5%, India is currently the world's sixth-largest economy.

Projection of income growth would see consumption spending increase from \$1.5 trillion to a massive \$5.7 trillion by 2030.

The growth is largely driven by a huge increase in the country's middle-class households, which are set to expand by 140 million, while the high-income earners are set to grow by 21 million – together a 51% increase on 2018.

Country Overview

GROWING WEALTH IS DISTRIBUTED ACROSS TOP AND LOWER TIER CITIES



The graph marks India's most affluent cities which include both Tier I and II cities.

While Tier I cities have long been economic centers of the country, tier II and III cities have seen immense growth and are pitched to be the country's future.

Their growth has been fostered by skill-intensive industries like IT, growing entrepreneurship and mid-sized industries.

26.4 trillion of household income in India is concentrated in tier II-III markets. These cities are projected to account for 45% of the country's consumption by 2025.

Tier I cities



Delhi
30.2 m people



Mumbai
25 m people



Kolkata
15.6 m people



Bangalore
12.2 m people



Chennai
11 m people



Hyderabad
10 m people

Tier II cities



Visakhapatnam
3 m people



Coimbatore
2.7 m people



Pune
6.6 m people



Surat
7 m people



Ahmedabad
8 m people



Chandigarh
1.1 m people



Japiur
3.8 m people

Media Consumption Overview

MEDIA CONSUMPTION CONTINUES TO RISE IN THE COUNTRY

Average Time Spent with Media in India, 2018-2022

hrs:mins per day among population

	2018	2019	2020	2021	2022
TV*	2:43	2:55	3:10	3:17	3:23
Digital	1:21	1:30	1:39	1:48	1:57
—Mobile (nonvoice)	1:05	1:13	1:21	1:28	1:35
—Desktop/laptop**	0:16	0:17	0:18	0:20	0:22
Print*	0:18	0:18	0:19	0:19	0:19
—Newspapers	0:17	0:17	0:17	0:17	0:17
—Magazines	0:01	0:01	0:01	0:01	0:01
Radio*	0:15	0:16	0:16	0:16	0:16
Total	4:38	5:00	5:24	5:40	5:55



The largest share of time is spent with TV.



15 minutes are spent listening to the radio everyday on an average.



Print remains most important news source for Indian readers

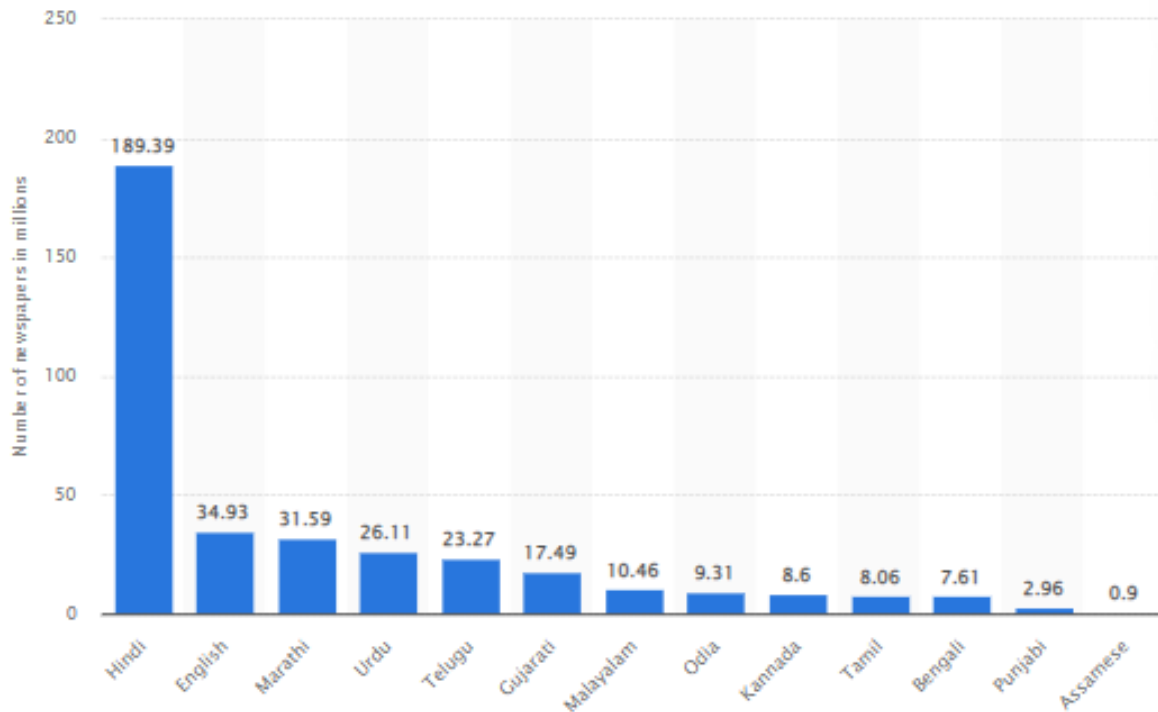


2nd highest number of internet users in the world.

Print Consumption

A GROWTH THAT NEGATES THE GLOBAL TREND

Number of publications circulated across India in 2021,
by language (in millions)



Of more than 386 million certified publications in India, a majority of the ones circulated were printed in Hindi in financial year 2021.

Print media is the second largest contributor of revenue (about 18%) to the media and entertainment industry in the country.

This medium has the highest advertisement in the country.

Overall readership of newspapers has grown from 407 million readers in 2017 to **425 million readers** at the end of the first quarter of 2019.

Print Consumption

TOP PRINT TITLES



Hindustan Times **Circulation: 1,072,966**

Hindustan Times is an Indian English-language daily newspaper. Acclaimed for its editorial quality, innovation and journalism ethics, Hindustan Times is India's second most-widely read English newspaper with 7.9 million readers across the nation.



The Hindu **Circulation: 1,415,792**

The Hindu is an English-language daily newspaper owned by The Hindu Group, headquartered in Chennai, India. Its independent editorial stand and its reliable and balanced presentation of the news have over the years, won for it the serious attention of the people.



Mint **Daily Circulation: 310,000**

Mint is an Indian financial daily newspaper published by HT Media. It mostly targets readers who are business executives and policy makers. It has been in circulation since 2007.



Business Line **Circulation: 117,000**

Business Line is a daily Indian business newspaper published by Kasturi & Sons, the publishers of The Hindu located in Chennai, India. The newspaper covers priority industry verticals, such as Agriculture, Aviation, Automotive and IT.

Print Consumption

TOP PRINT TITLES



Times of India **Daily Circulation: 2,880,144**

The Times of India (TOI) is an Indian English-language daily newspaper owned by The Times Group. In the Brand Trust Report India study 2019, The Times of India was rated as the most trusted English newspaper.



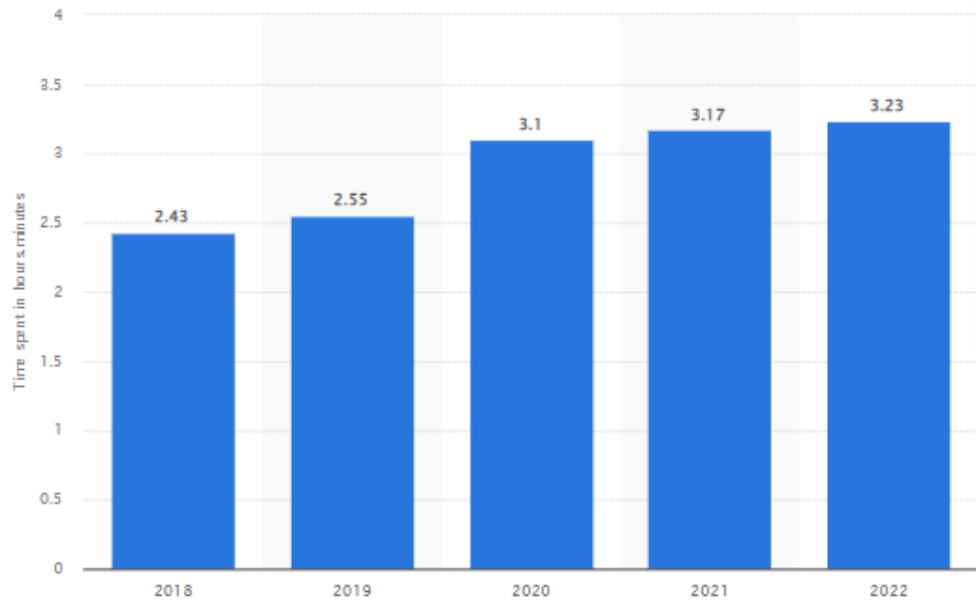
Deccan Herald **Circulation: 1,243,000**

Deccan Herald (DH) is an Indian English language daily newspaper published from the Indian state of Karnataka. The opinion pages present a variety of views on national, state and international issues and the editorials are known for their well-informed commentary.

TV Consumption

HAS THE HIGHEST PENETRATION IN INDIA

**Average daily television consumption
(in hours minutes)**



Each household watches over 3 hours of TV everyday.

Over the last four years, the volume of advertising on TV has grown by 21%.

As many as 222 million individuals tune in to primetime TV at any given time.

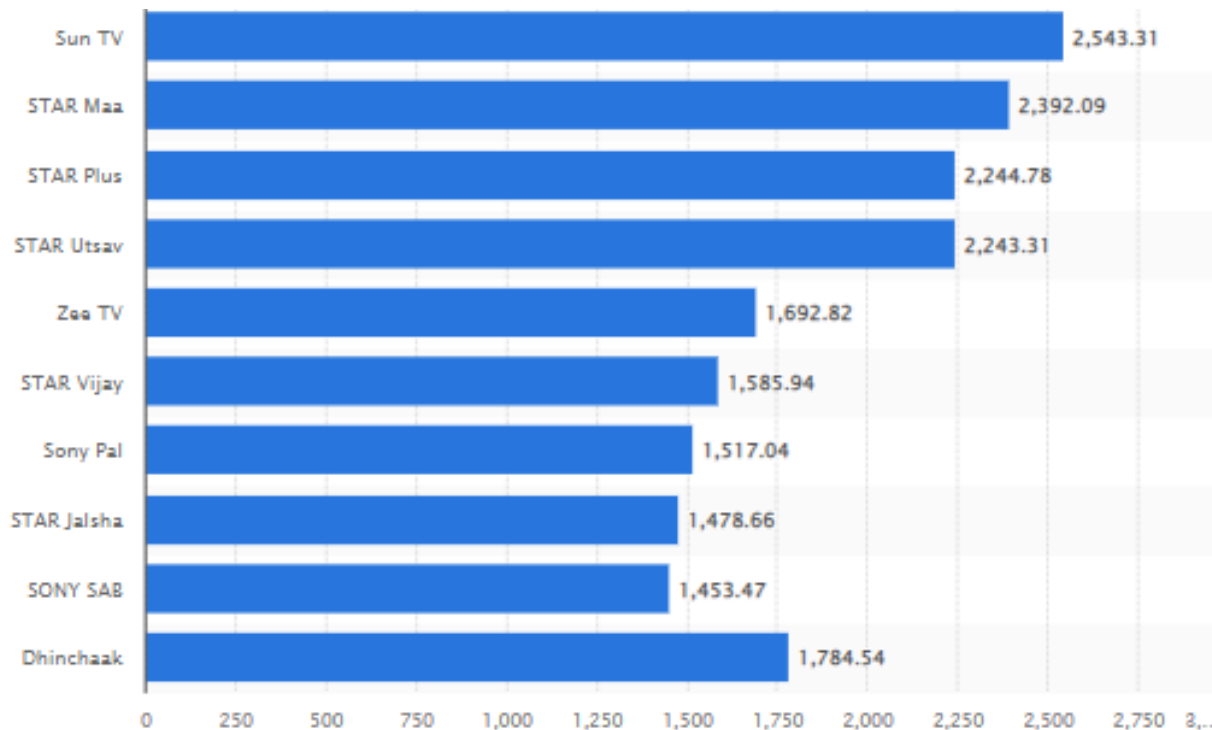
80% of TV content is consumed through co-viewing.

General entertainment channels and movies account for three-fourths of the viewership .

TV Consumption

TOP TV CHANNELS

Leading television channels across India in 2022, by weekly viewership



- During February 12 to 18, 2022, Sun TV was the leading Indian television channel with over 2.5 million viewership across India.
- STAR Maa and STAR Plus came second and third respectively as the leading channels.
- Overall, STAR Utsav has been doing exceedingly well in the subcontinent due to its well-received programs.

Radio Consumption

SECOND MOST ACCESSED MEDIA IN INDIA

GROWTH:

- The radio industry across India had a market size of around 27.5 billion Indian rupees in the financial year 2019, up from about 19.8 billion rupees in the financial year 2015.

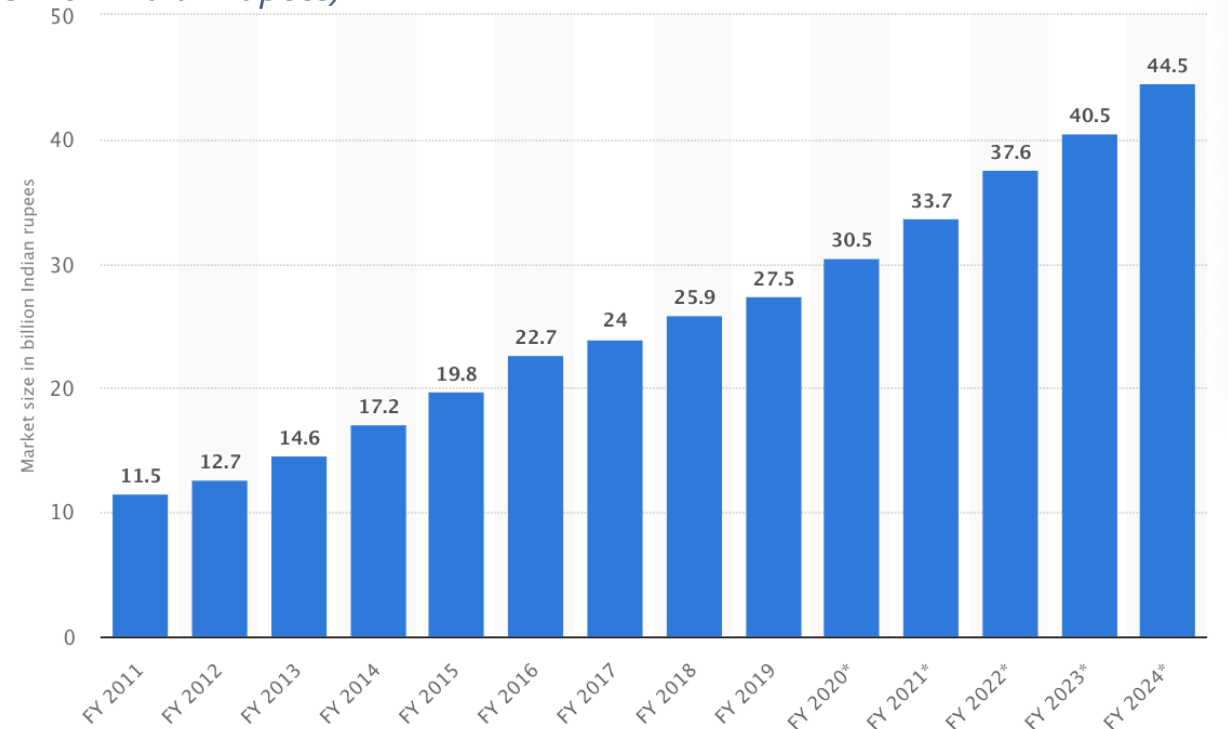
REACH:

- While 86% of the total people in metro cities consume radio, social media is consumed by 83% of the people.
- Any advertisement on it is seen to be most effective in the 26-45 years age group.

EFFECTIVENESS:

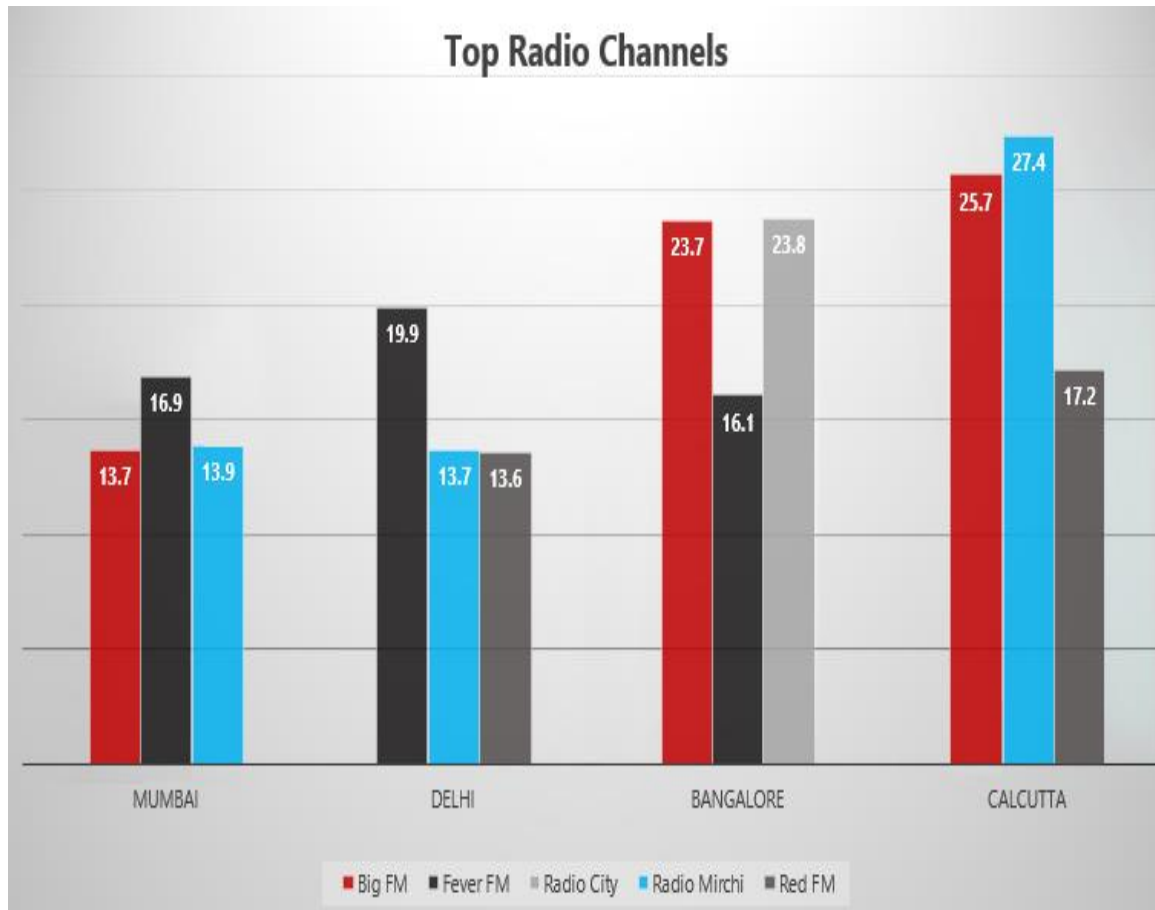
- It's the second most effective medium in driving purchase intent in India, after TV.
- Radio gives 17% incremental awareness over print for the real estate sector.

Market size of the radio industry across India from FY 2011 to FY 2024 (in billion Indian rupees)



Radio Consumption

TOP RADIO STATIONS



Fever FM

Languages: Hindi, English and Regional.

Metro Presence: Mumbai, Bengaluru, Delhi, Kolkata, Hyderabad, Chennai, Lucknow, Kanpur and Agra.

Radio City

Languages: Hindi, English and Regional.

Metro Presence: Mumbai, Bengaluru, Lucknow, New Delhi, Hyderabad, Chennai, Ahmedabad, Coimbatore, Jaipur, Kanpur, Nagpur and Vishakhapatnam.

Big FM

Languages: Hindi, English and Regional.

Metro Presence: Delhi, Mumbai, Bangalore, Chennai, Kolkata, Vizag, Madurai, Kochi, Trivandrum, Vijayawada and Hyderabad.

Radio Mirchi

Language: Hindi

Metro Presence: Delhi, Mumbai, Indore, Jaipur, Chennai, Kolkata, Nagpur, Mangalore, Bangalore and Goa.

My FM

Languages: Hindi, and regional

Metro Presence: Ahmedabad, Chandigarh, Jaipur, Indore, Bhopal, Raipur, Surat, Nashik, Aurangabad and Rajkot.

Digital Consumption

INTERNET USERS IN INDIA INCREASED BY 5.4 PERCENT BETWEEN 2021 AND 2022



Digital Consumption

INDIANS SPEND THE MOST TIME ON YOUTUBE

FEB 2022

MOST-VISITED WEBSITES: SIMILARWEB RANKING

RANKING OF THE MOST-VISITED WEBSITES ACCORDING TO SIMILARWEB, BASED ON ANNUAL WEBSITE TRAFFIC FOR FULL-YEAR 2021

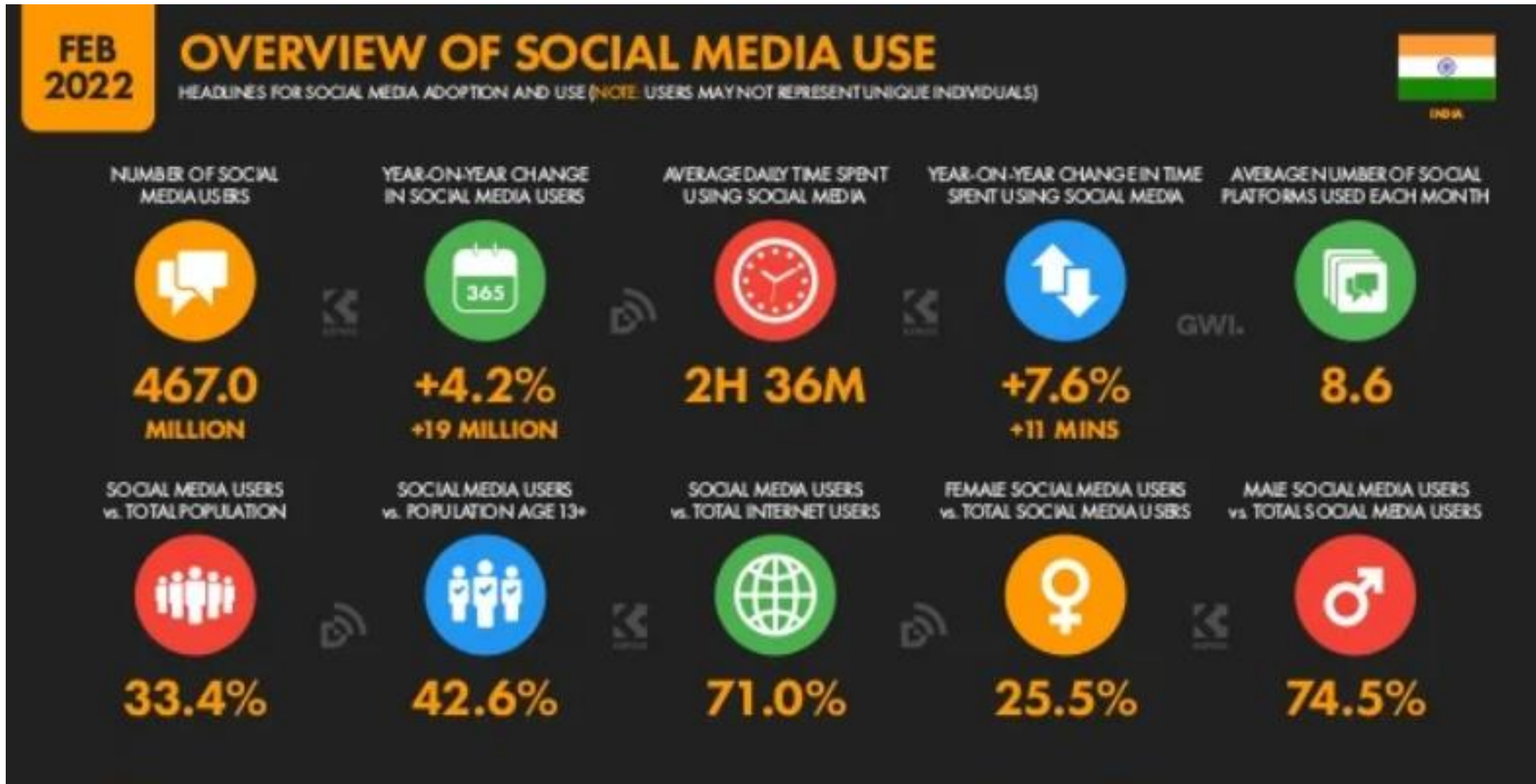

INDIA

#	WEBSITE	TOTAL VISITS	MOBILE SHARE	DESKTOP SHARE	TIME PER VISIT	PAGES PER VISIT
01	GOOGLE.COM	64.3B	71.4%	28.6%	9M.49S	7.86
02	YOUTUBE.COM	21.2B	47.1%	52.9%	18M.38S	9.85
03	FACEBOOK.COM	16.8B	91.1%	8.9%	6M.33S	6.17
04	INSTAGRAM.COM	6.12B	87.0%	13.0%	8M.58S	11.82
05	ZOOM.US	3.58B	82.6%	17.4%	2M.55S	2.73
06	WHATSAPP.COM	3.55B	31.4%	68.6%	2M.55S	1.54
07	AMAZON.IN	3.46B	65.2%	34.8%	5M.29S	7.44
08	TWITTER.COM	3.03B	78.5%	21.5%	7M.06S	8.05
09	REALSY.COM	3.00B	99.4%	0.6%	0M.38S	2.02
10	XVIDEOS2.COM	2.98B	99.2%	0.8%	4M.09S	8.75

#	WEBSITE	TOTAL VISITS	MOBILE SHARE	DESKTOP SHARE	TIME PER VISIT	PAGES PER VISIT
11	WIKIPEDIA.ORG	2.94B	77.5%	22.5%	3M.04S	2.49
12	GOOGLE.CO.IN	2.92B	59.0%	41.0%	6M.33S	7.69
13	16HAMSTER.COM	2.39B	99.2%	0.8%	1M.04S	2.06
14	FLIKART.COM	2.27B	76.1%	23.9%	5M.03S	6.40
15	XVIDEOS3.COM	2.03B	99.0%	1.0%	5M.00S	10.71
16	HOTSTAR.COM	1.88B	60.9%	39.1%	9M.23S	4.36
17	INDIATIMES.COM	1.84B	78.4%	21.6%	4M.29S	3.17
18	COWINGOOV.IN	1.81B	87.8%	12.2%	6M.31S	6.25
19	ORICEBUZZ.COM	1.80B	88.5%	11.5%	8M.17S	2.23
20	XVIDEOS.COM	1.74B	97.4%	2.6%	8M.12S	4.77

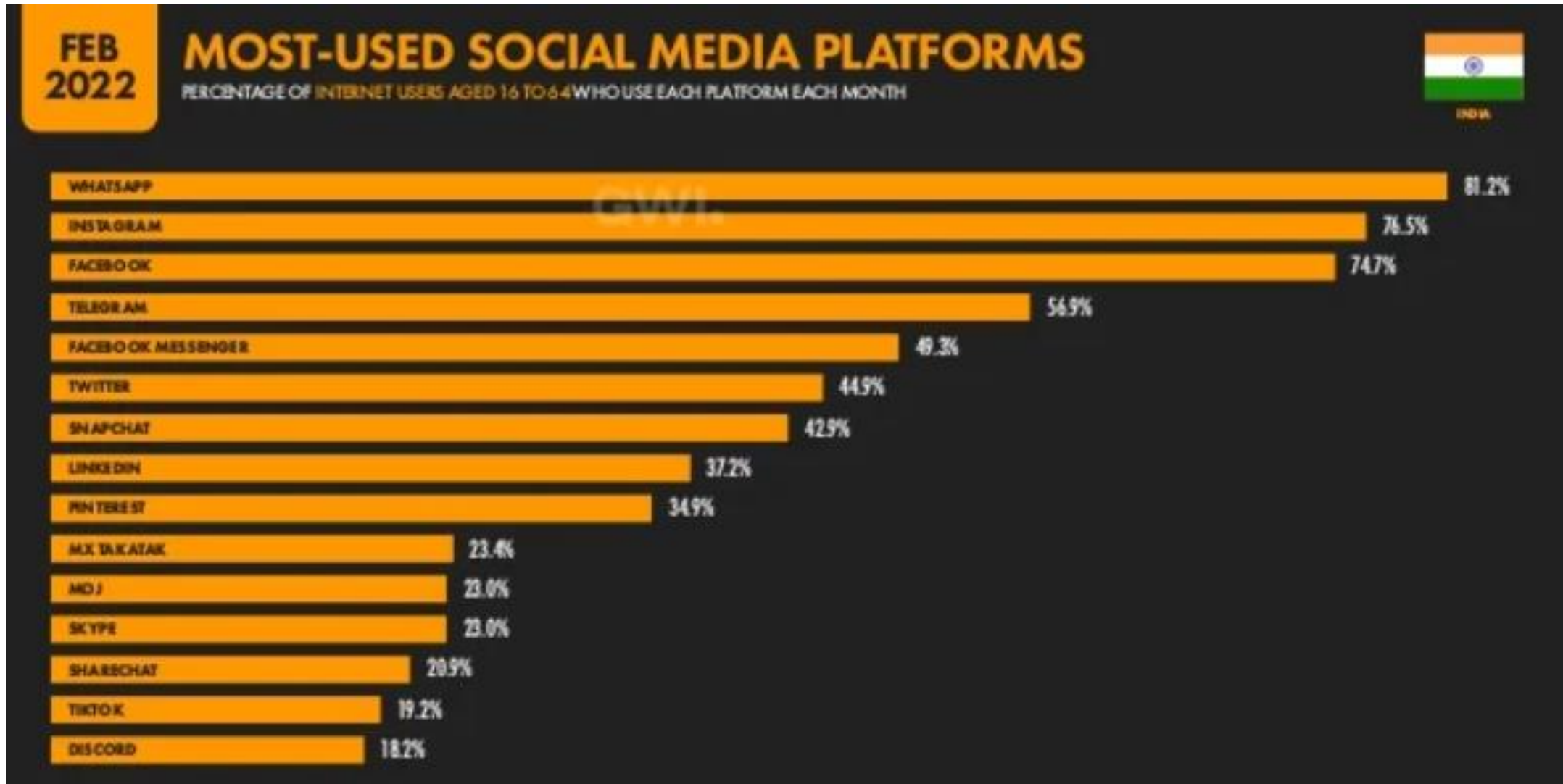
Digital Consumption

SOCIAL MEDIA USERS IN INDIA INCREASED BY 4.2 PERCENT BETWEEN 2021 AND 2022



Digital Consumption

WHATSAPP IS THE MOST USED SOCIAL MEDIA PLATFORM, FOLLOWED BY INSTAGRAM



OOH

COVERAGE OVERVIEW

India has a myriad of OOH solutions allowing us to target specific demographics and areas.

REACH

DIGITAL SCREENS



FAME

HIGHWAY BILLBOARDS



WALLSCAPES



CONNECT

RETAIL & POS



AIRPORTS



KEY CITIES:

New Delhi
Mumbai
Bengaluru
Pune
Ludhiana
Chandigarh
Surat
Ahmedabad
Mangalore
Jaipur
Kochi

OOH sites in all major cities



Delhi

Mumbai

Pune



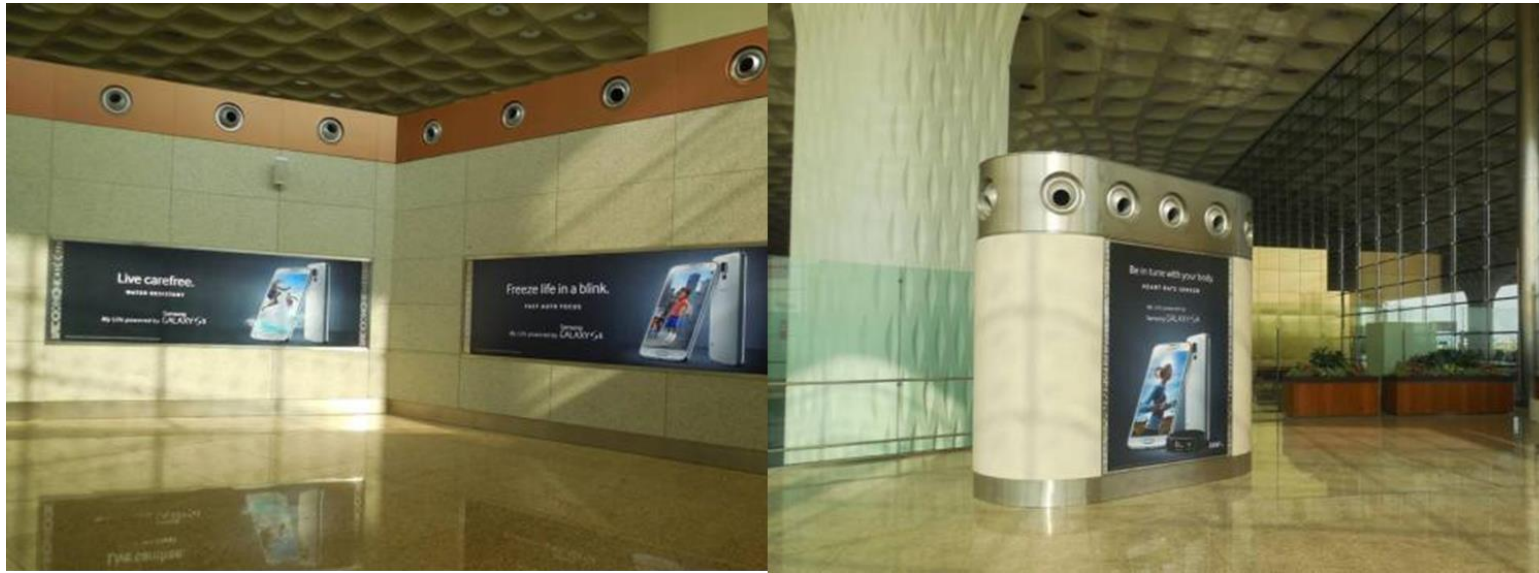
Jaipur



Bangalore



AIRPORT SITES



Chhatrapati Shivaji
International Airport,
Mumbai



Indira Gandhi International
Airport, New Delhi

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